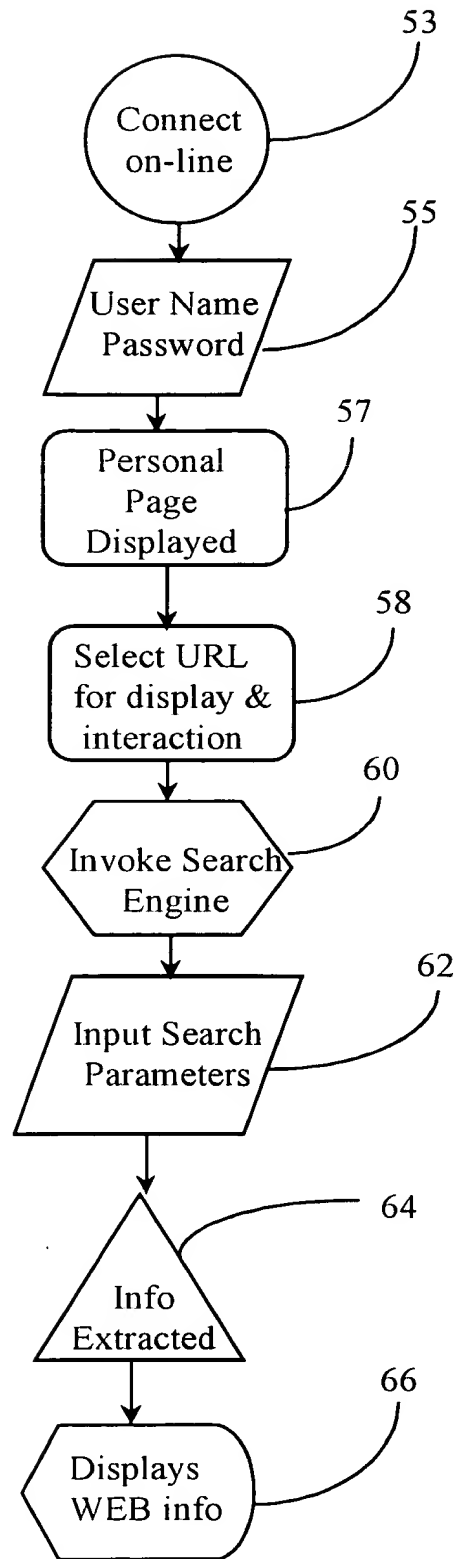


Fig. 1

09603708-102700

Figure 1 is a schematic diagram of a web browser window displaying a personalized page. The browser window (32) has a title bar (34) and a navigation bar (35). The main content area (37) displays a table with columns: Search (41), Agent (43), Last (45), Update (47), and ADD (49). The table lists various services: LBC.com, My Bank.com, My Stocks.com, My Shopping.com, Mortgage.Com, and Airline.com. Each row includes a User Name and a Password field. A search bar (51) with a search button (52) is located at the bottom of the page.

**Fig. 2**



**Fig. 3**

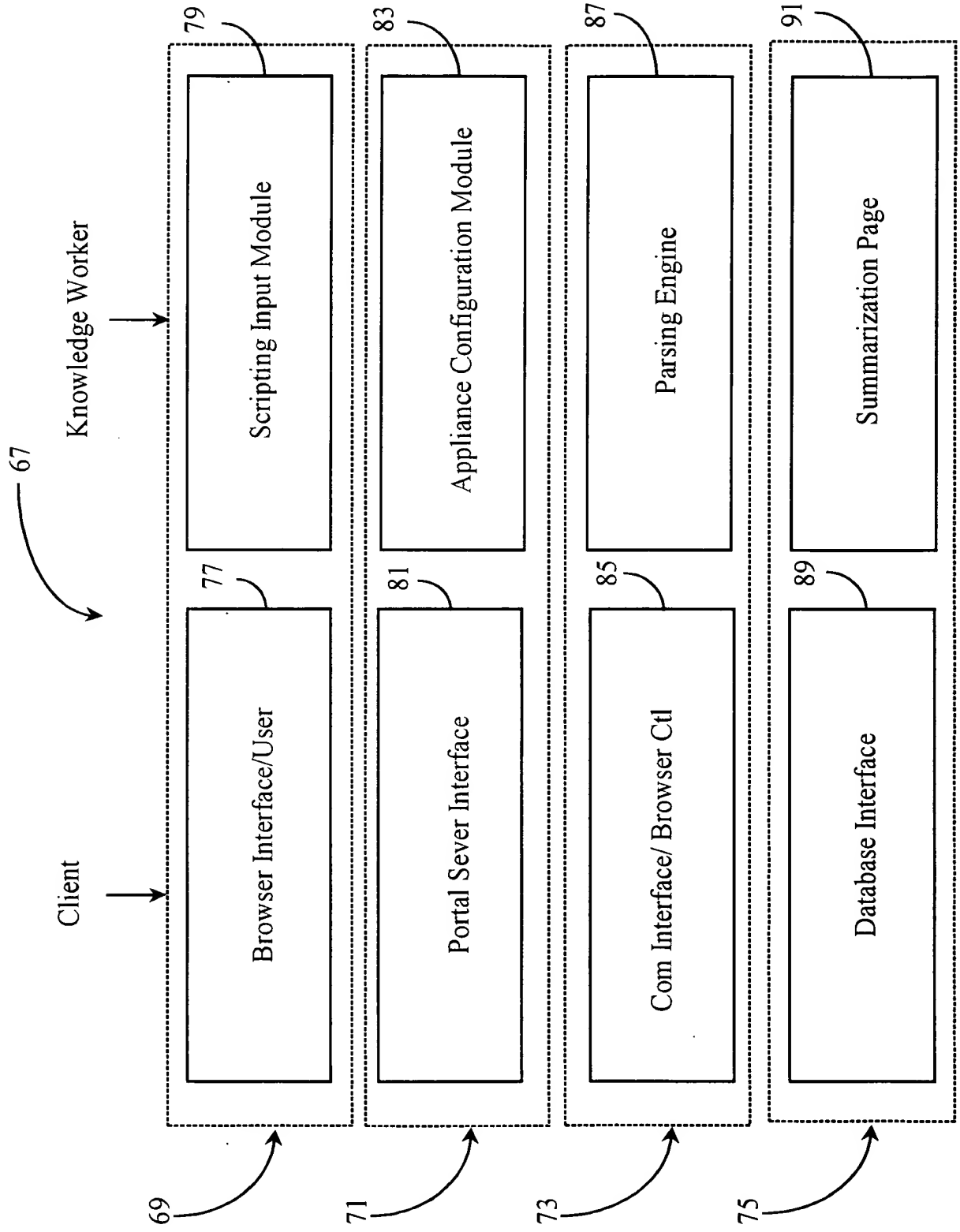
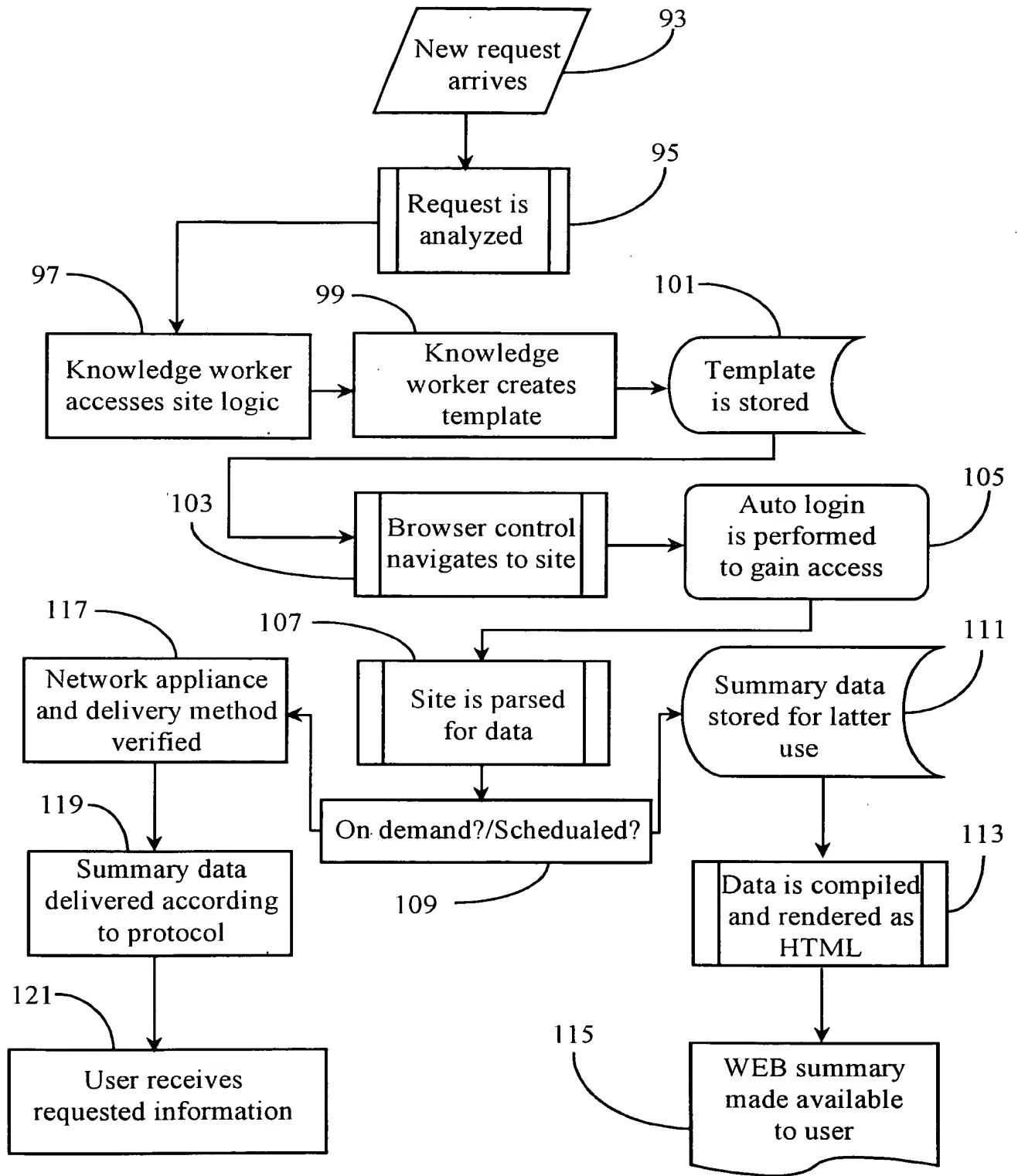
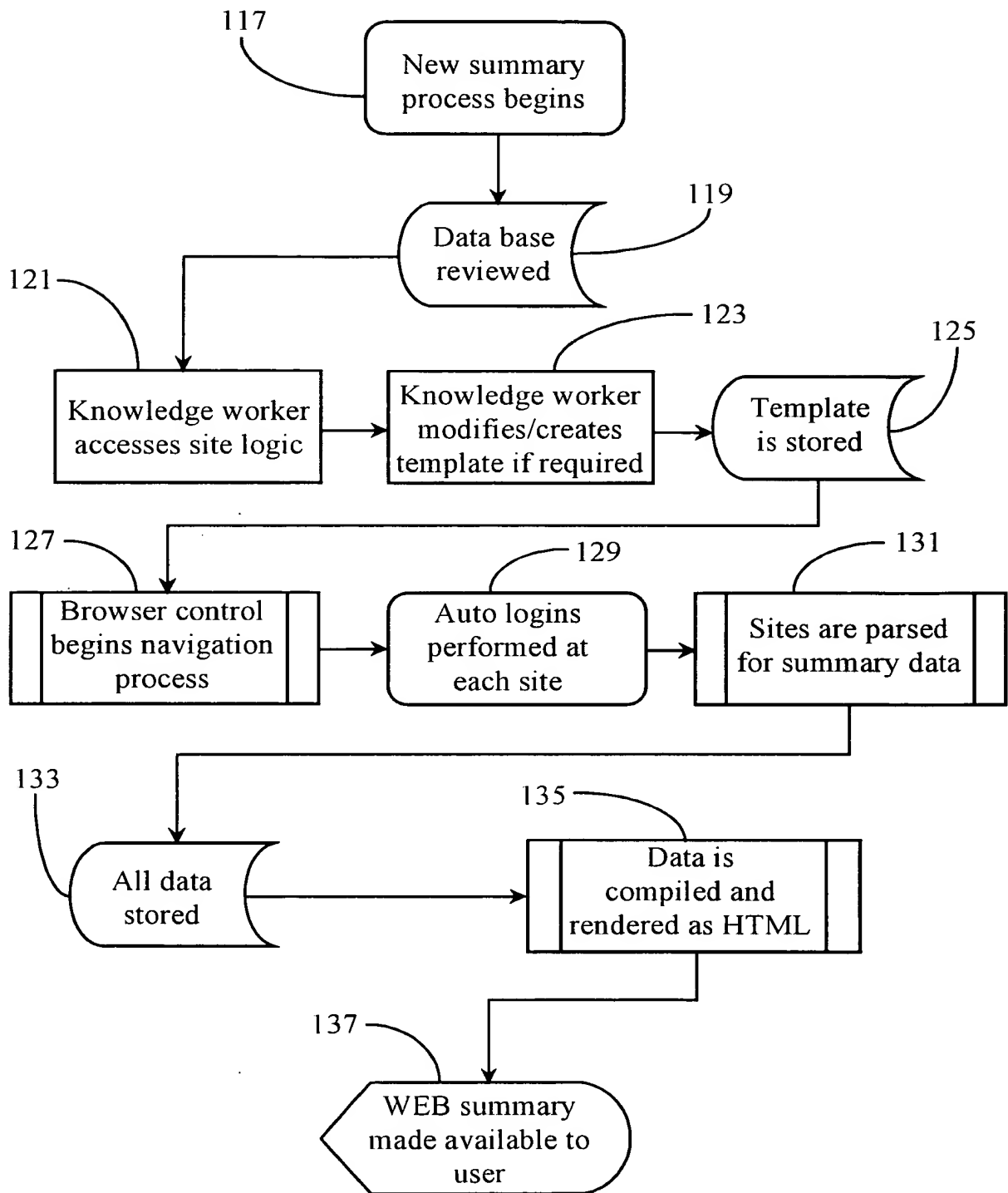


Fig. 4



**Fig. 5**



**Fig. 6**

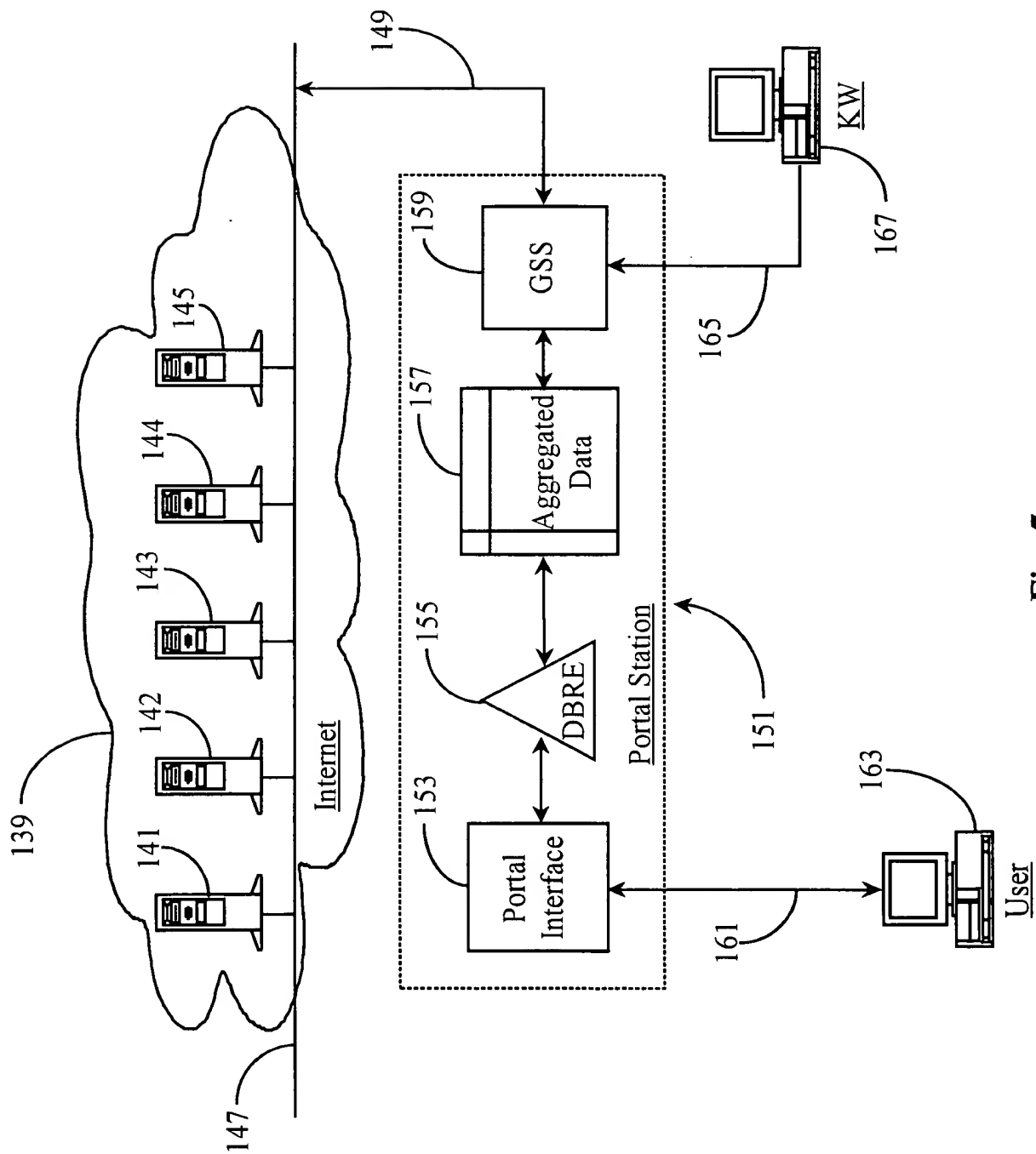


Fig. 7

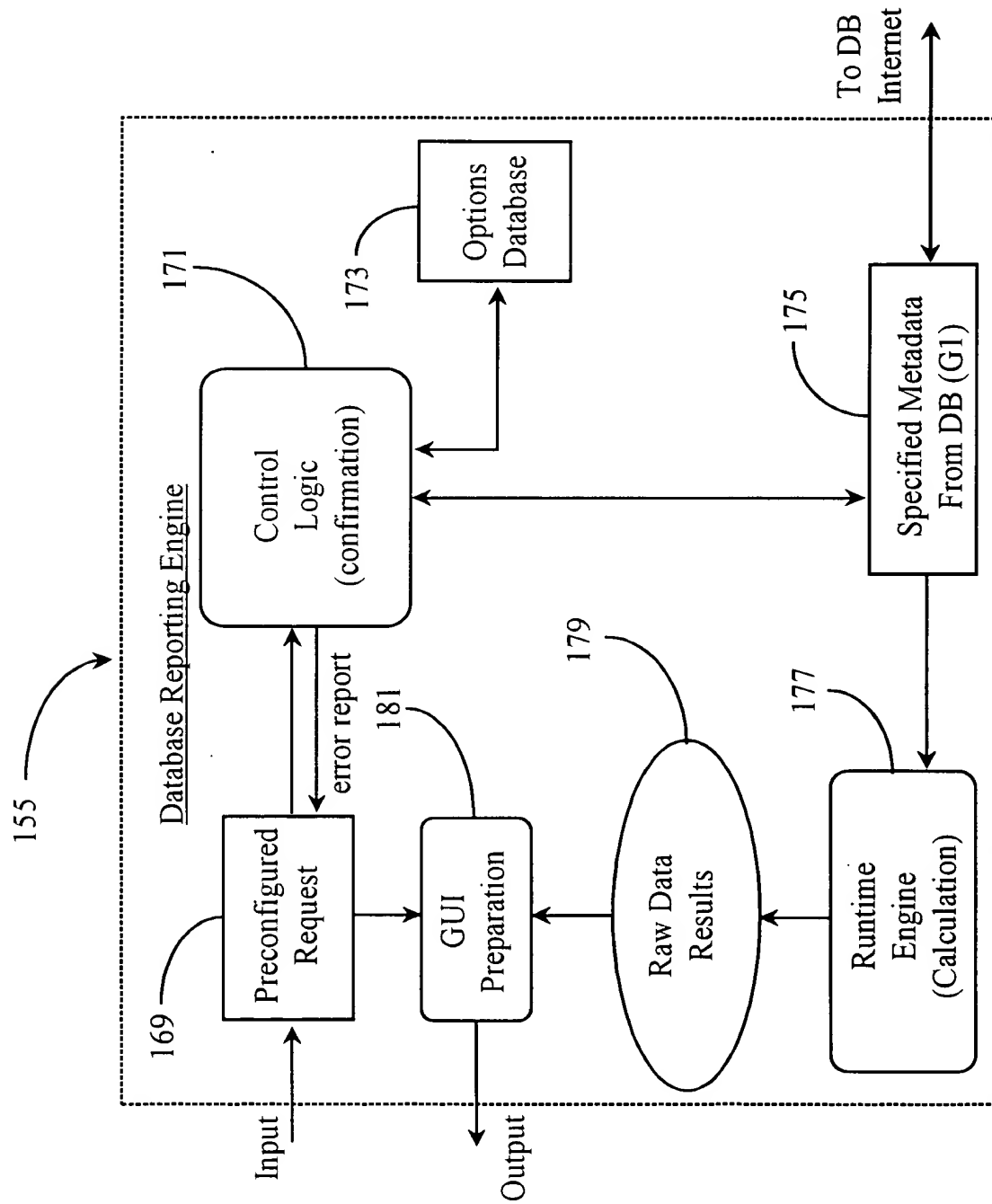
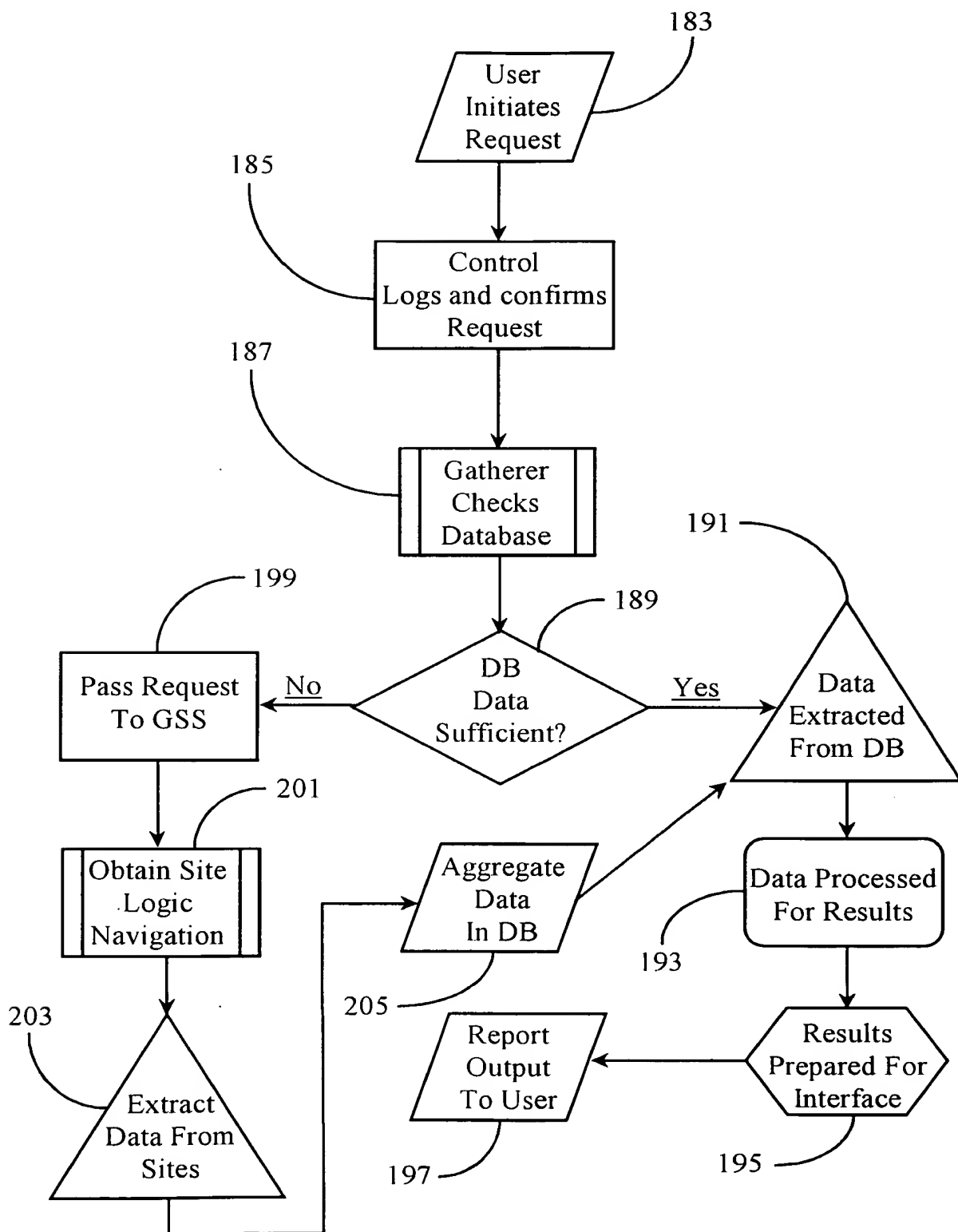


Fig. 8





**Fig. 9**

207

Personal's Yodlee - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Related

Address [http://sunserver.20000/magic/bogn/cont\\_anchor=0174b6jrt\\_teb\\_id=45thb174b](http://sunserver.20000/magic/bogn/cont_anchor=0174b6jrt_teb_id=45thb174b)

Links

**Banks** Add Edit Hide

**Stanford Federal Credit Union** Edit

Account	Balance
Savings - 1	0.15

Last Refresh: 8 days ago - Refresh

**Wells Fargo** Edit

Account	Balance
CHECKING	34973.92
CHECKING	35457.68
MRA	40779.89
SAVINGS	101.60

Last Refresh: 8 days ago - Refresh

**Bank Summary**

Summary	Amount
TOTAL BALANCE	111313.24

**Investments** Add Edit Hide

**Datek Online** Edit

Symbol	Quote	Quantity	\$ Change
CSCO	69	1	- 3/8
HLIT	112 3/8	1	-4 5/16
portfolio_balance			N/A
Total Account Balance			2029.55

Last Refresh: 2 hrs ago -

**Investment Summary**

Summary	Amount
TOTAL STOCK BALANCE	181.375
TOTAL ACCOUNT VALUE	2029.55

12:29 AM Start C... M... Y... Y... C... A... G... E... W... P... E... M... Local Inter

Fig. 10

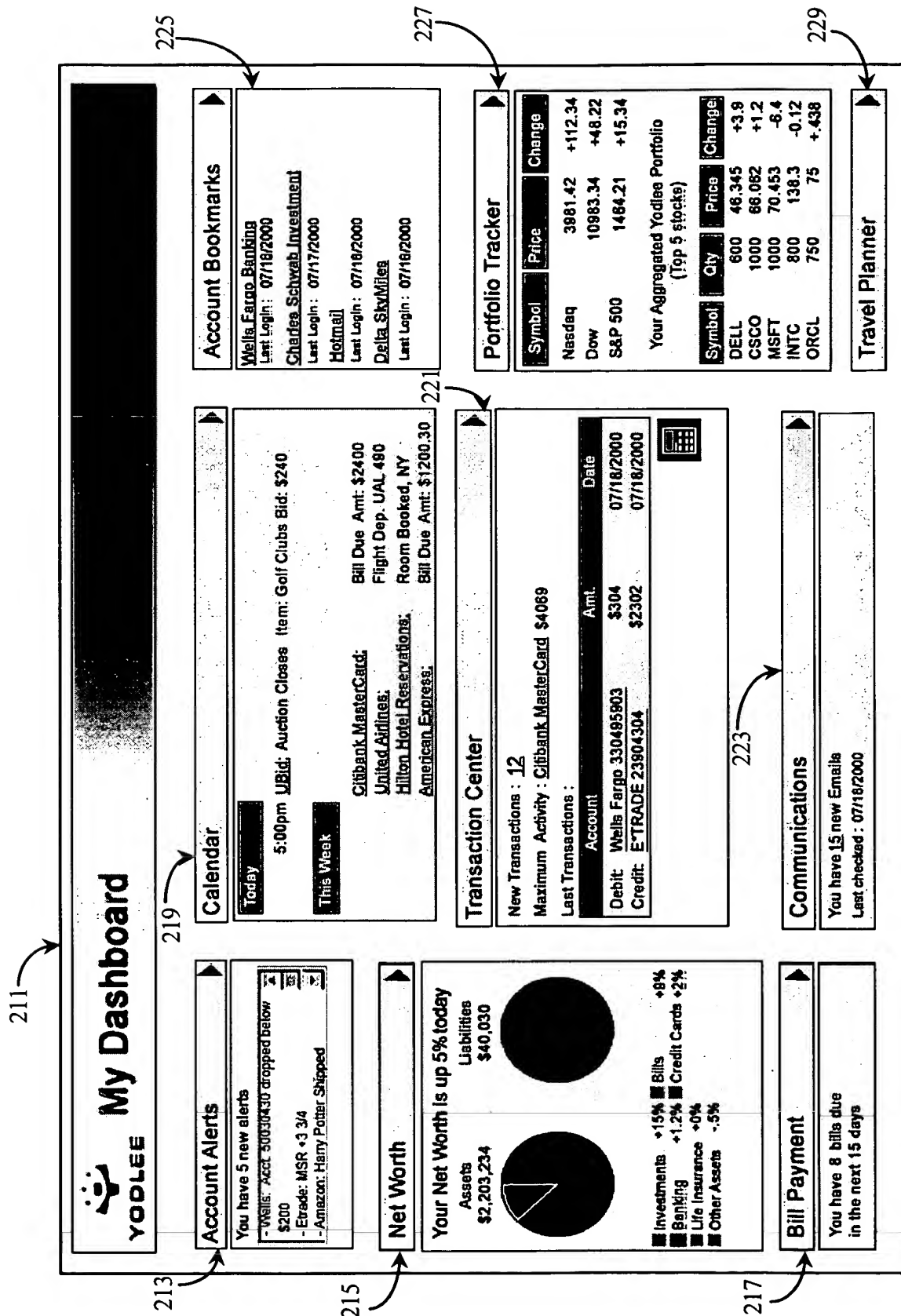


Fig. 11

004207" 80486960

YODLEE

My Dashboard

DAY

WEEK

MONTH

YEAR

235

237

239

241

YODLEE CALENDAR

233

JULY 18 - 24, 2000

Print

231

Tuesday July 18th

5:00pm UELid: Auction Closing - Nom: Golf Clubs HighBid: \$240

Wednesday July 19th

8:00am United Airlines: Flight Departure - Flight # UAL490 Departing SFO

10:00am Hilton Hotel Reservations: Room Booked - New York Hilton, Single Room

Thursday July 20th

All Day Citibank MasterCard: Bill Due - Amt. \$2400

Friday July 21st

8:00am - 9:00am Tee Time - Silver Vista Golf Club. Call Jim.

Saturday July 22nd

All Day Amazon.com: Back Order 1206043 Due to ship - Item: Harry Potter Price: \$20

All Day Pacific Bell: Bill Due - Amt. \$100

Sunday July 23rd

All Day PG&E: Bill Due - Amt. \$100.34

Monday July 24th

All Day American Express: Bill Due - Amt. \$1200.30

Click on an Account to log in

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239

241

235

237

239


241

235

237

239

24


**My Dashboard**  
YODLEE

TRANSACTION CENTER

Tuesday, July 18th

243

New Transaction Summary

Chase Visa Credit Card : 5 new transactions  
Wells Fargo Savings : 3 new transactions  
Wells Fargo Checking : 2 new transactions  
ETRADE : 2 new transactions

249

Select an Account

Chase Visa Credit

247

Amount

\$34.12

251

Email My CPA

253

View History

255

Bill Payment

245

Delete

Archive

Date	Description	Amount	Category	Delete	Email CPA
07/14/2000	Pizza Hut, San Jose CA	\$34.12	Dining Out	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07/15/2000	AT&T Wireless, CA	\$19.99	Utilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07/16/2000	BEST BUY, Redwood Cty, CA	\$340.23	Home	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
07/17/2000	Honda City, San Jose, CA	\$72.54	Auto	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07/18/2000	Barnes and Noble, San Jose CA	\$13.02	Misc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Fig. 13**

257

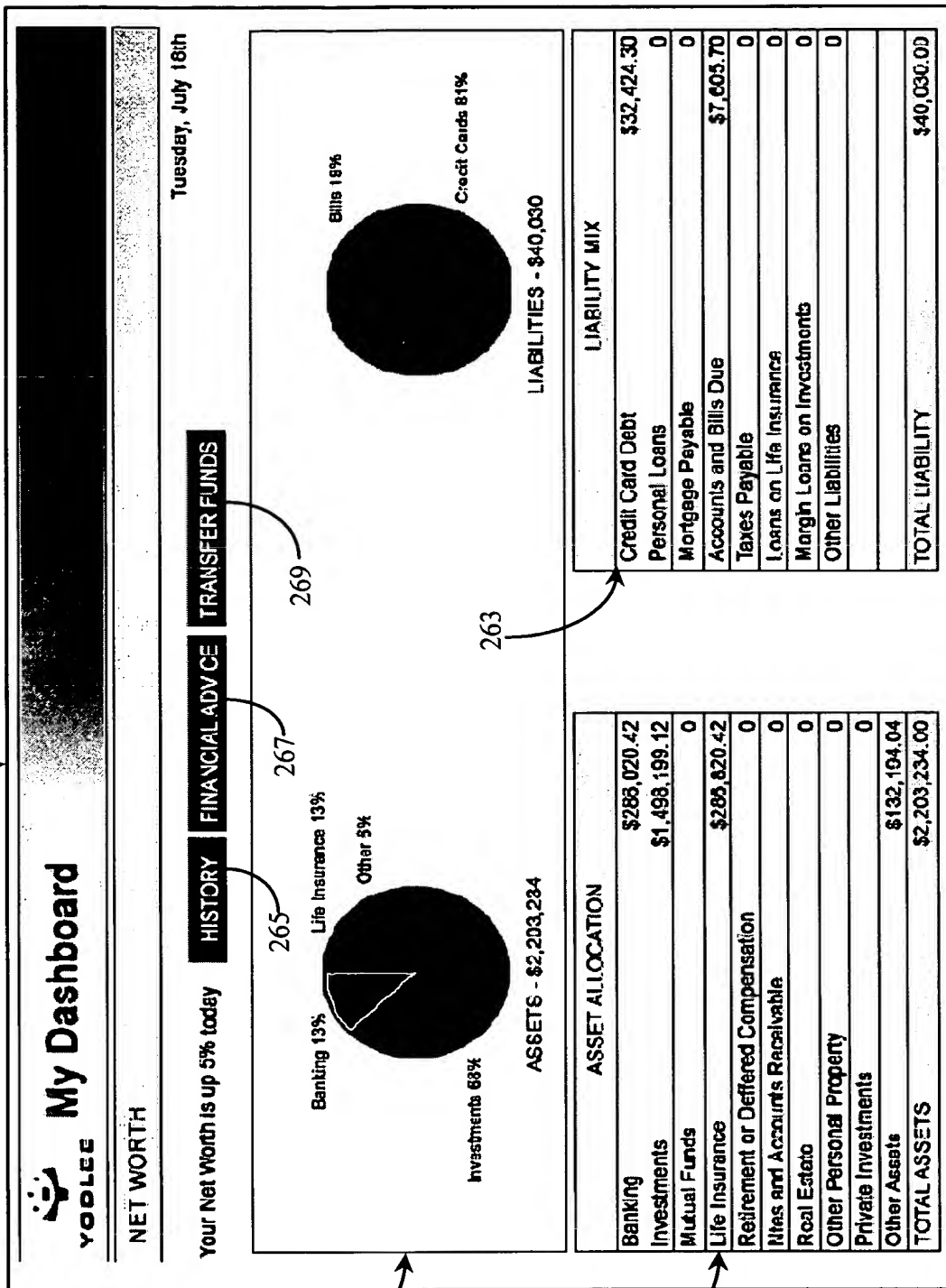



Fig. 14

271 →



# My Dashboard

---

## CONSOLIDATED PORTFOLIO TRACKER

273 →

**Your Yodlee Consolidated Portfolio:**

Tuesday, July 18th

279 →

Symbol	Name	Quantity	Price	Est. Value	View Individual Holdings
DELL	Dell Computer Systems	1500	46.345	\$68,517.50	Charles Schwab Go
CSCO	Cisco Systems	2000	66.062	\$132,124.00	Charles Schwab Go
MSFT	Microsoft Corporation	1200	70.453	\$84,543.60	Merrill Lynch Go
INTC	Intel Corporation	3000	138.3	\$414,900.00	Roth IRA Go
ORCL	Oracle Corporation	4500	75	\$337,500.00	Fidelity 401K Go
EXDS	Exodus Communications	200	85.47	\$17,094.00	Fidelity 401K Go
					Roth IRA
					Merrill Lynch
				<b>TOTAL POSITION VALUE: \$1,125,196.00</b>	

Include the following Accounts

☒ Charles Schwab

☐ TD Waterhouse

☒ Fidelity 401K

☒ Roth IRA

☒ E\*TRADE

☒ Merrill Lynch

Fig. 15